

# Unlock insights for quick, confident decisions with agentic AI

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Organizations are dealing with unprecedented amounts of data

175

Zettabytes of anticipated global data by 2025<sup>1</sup>

80%

Information that is unstructured or semi-structured content<sup>2</sup>

61%

Companies that say data volume limits their ability to fully harness their data<sup>3</sup>

Source: 1. Deloitte 2023 – 1 zettabyte is equal to 1 trillion gigabytes  
Source: 2. MarketsandMarkets 2019  
Source: 3. G2 2023

#1

How many of you  
spend time reading  
or reviewing  
documents as part of  
your day-to-day  
work?

#2

How much time per day are you spending reading or reviewing documents?



Information is buried in documents, resulting in poor decision-making, productivity decline, and lost opportunities



Manual review of documents is *still* one of the biggest pain points across industries

“Our users are in the FileNet viewer reading documents all day long to find information.

Anything that would reduce that time would be a big win.”



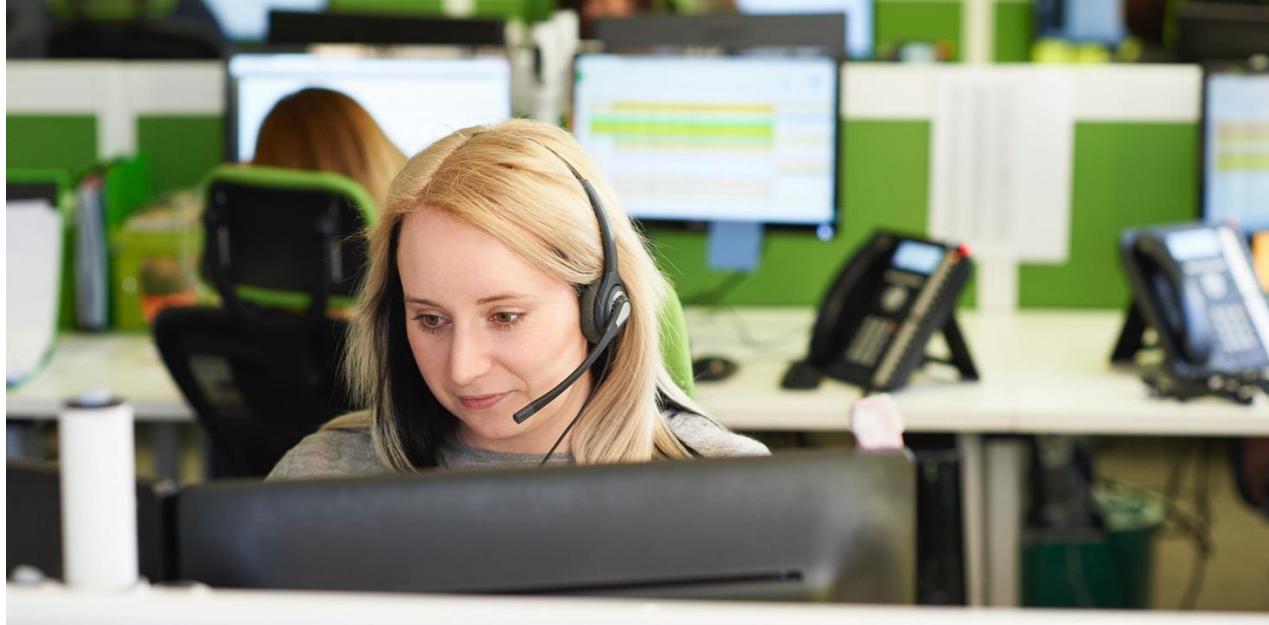
“We have millions of documents stored in our repository, but it’s almost impossible to get the right answer without a lot of manual content search.”



“Today, we have people manually checking information collected from documents.”



“Our users need to find the information they need in a **quick and controlled** manner.”



“Being able to **summarize** and pull out key pieces of data from our documents is a **huge time saver.**”



“We receive documents that contain information related to multiple customers, and users have to **manually extract information.**”



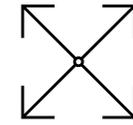
# Apply AI; **Increase productivity**



Ask questions and get answers about a document or set of documents across terabytes of data



Automatically generate summaries to quickly access the information you need

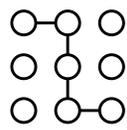


No complex software to install – take advantage of LLMs with your existing repositories





Prevent data leakage – document security is always honored

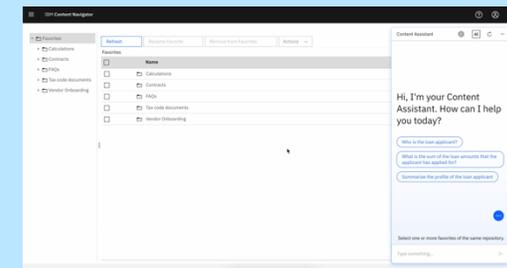


Traceable and auditable – see what was used to generate answers and save Q&A for auditing

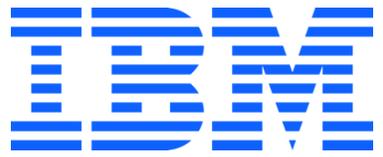


Maintain compliance – when documents are deleted, all related information is also deleted

Use IBM Content Assistant;  
**Preserve governance and security**



Demo





# enChoice AI Enabler for FileNet

Presenter:  
Michael Monteiro, Senior Consultant



#1

Are your documents  
AI-ready?

# #2

Have you tried (and failed) to copy text from a PDF?

(e.g., to paste into a Word document)

#3

Do you have Records Management in your job title or job description?

# enChoice AI Enabler for FileNet

Client readiness is key to leveraging Content Assistant.

## Business Challenge

- ✓ FileNet clients have massive repositories containing valuable information that **can only be searched by document properties**.
- ✓ Most content repositories are not fully AI-ready, so clients cannot fully leverage IBM Content Assistant. For example, documents stored as **TIFF** or **image-based PDFs** are not AI-ready.

AGENCY PHONE (A/C, No, Ext): 813-555-4400		COMPANY NAIC CODE: 3548		MISCELLANEOUS INFO (Site & location code) Tampa SPT1	
FAX (A/C, No): 813-555-4410		POLICY NUMBER 187-1212-715-0		POLICY TYPE Full	
E-MAIL ADDRESS: SP.travelers.tampa@travelers.com		REFERENCE NUMBER 340098		CAT # TR-8	
AGENCY CUSTOMER ID: 000101202		EFFECTIVE DATE 7/1/2023		EXPIRATION DATE 6/30/2024	
SUB CODE: SPT		DATE OF ACCIDENT AND TIME 9/30/23 9:50		PREVIOUSLY REPORTED <input checked="" type="checkbox"/> AM <input checked="" type="checkbox"/> PM <input type="checkbox"/> YES <input type="checkbox"/> NO	
INSURED			CONTACT		
NAME AND ADDRESS Theresa Hockingstone 207 Hummingbird way Tampa, FL 33606		SOC SEC # OR FEIN: 143-22-0991		NAME AND ADDRESS Theresa Hockingstone 207 Hummingbird way Tampa, FL 33606	
RESIDENCE PHONE (A/C, No): 813-250-8931		BUSINESS PHONE (A/C, No, Ext): 813-762-9421		WHEN TO CONTACT: Daytime	
CELL PHONE (A/C, No): 813-762-9421		E-MAIL ADDRESS: thockingstone1@gmail.com		WHERE TO CONTACT Home or Cell	
RESIDENCE PHONE (A/C, No): 813-250-8931		BUSINESS PHONE (A/C, No, Ext): 813-762-9421		CONTACT INSURED	
CELL PHONE (A/C, No): 813-762-9421		E-MAIL ADDRESS: thockingstone1@gmail.com			
LOSS			AUTHORITY CONTACTED: Tampa PD		
LOCATION OF ACCIDENT (Include city & state) Theresa Hockingstone 207 Hummingbird way Tampa, FL 33606		REPORT #: 23-093087		VIOLATIONS/CITATIONS N/A	
DESCRIPTION OF ACCIDENT (Use separate sheet, if necessary) Wind from storm knocked over a tree on Theresa's property which fell into the road and hit multiple cars.					

# enChoice AI Enabler for FileNet

*Client readiness is key to leveraging Content Assistant.*

## Business Challenge

- ✓ FileNet clients have massive repositories containing valuable information that **can only be searched by document properties**.
- ✓ Most **content repositories are not fully AI-ready**, so clients cannot fully leverage IBM Content Assistant. For example, documents stored as **TIFF** or **image-based PDFs** are not AI-ready.

## Business Solution

- ✓ **enChoice's AI Enabler** focuses on “**client readiness**” by converting documents into a searchable format that can fully leverage IBM Content Assistant.



# enChoice AI Enabler: How it Works



Leverages the FileNet Sweep framework:

- ✓ Choose the relevant documents to AI enable
- ✓ Can be scheduled to run during non-business hours
- ✓ Scalable to address document processing requirements

# enChoice AI Enabler: How it Works



## Leverages the FileNet Sweep framework:

- ✓ Choose the relevant documents to AI enable
- ✓ Can be scheduled to run during non-business hours
- ✓ Scalable to address document processing requirements

## Conversion process

- ✓ Retrieves PDF and TIFF documents from FileNet
- ✓ Performs OCR
- ✓ Embeds the text in the pages
- ✓ Adds a new document version to the repository

# enChoice AI Enabler: How it Works



## Leverages the FileNet Sweep framework:

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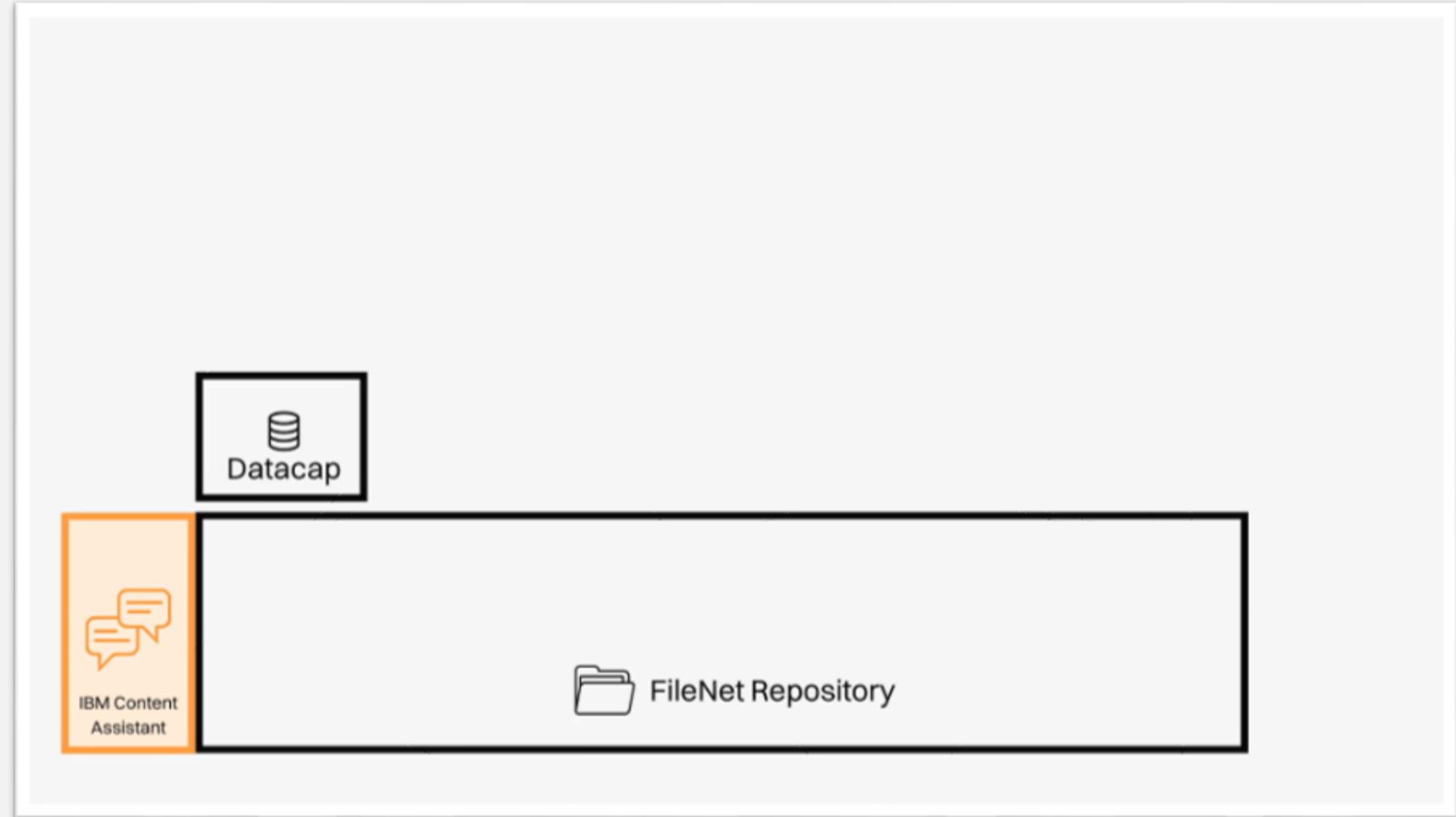
## Conversion process

- ✓ Retrieves PDF and TIFF documents from FileNet
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## Enables both existing and day-forward content



# How enChoice AI Enabler Works

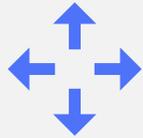


# enChoice AI Enabler for FileNet Use Case #1: Business Manuals



- ✓ Agent/field office support model
- ✓ Documents that are both archived and added to FileNet daily
- ✓ Want to empower agents to ask questions of that content
- ✓ Reduce underwriting support required

# Use Case #1: | Business Problem



Dynamic environment

- ✓ **Volume growth**
- ✓ **Employee turnover**



Traditional search based on  
index values  
**generates large document  
result sets**



Requires **extensive  
manual review** to find  
the answers

# Use Case #1: | Assumptions

800,000+  
Documents

800,000+ existing documents in FileNet for summarization and Q&A by IBM Content Assistant

4 Million  
Pages NOT AI Ready!

800,000 documents  
x 5 pages per document = 4 million pages of PDF Images and TIFF files – NOT AI Ready!

650  
Questions

Users will ask approximately 650 questions per day

# Use Case #1:

# Solution



Research that took  
**4+ minutes** can  
now be done in  
**seconds!**



Improved agent  
**self-service** and  
**satisfaction**



Agent Support  
**FTE Savings:**  
**\*5.4 full-time equivalent  
employees**

\*650 queries x 4 minutes = 2,600 minutes / 60 minutes per hour = 43.33 hours per day savings / 8 work hours per day = 5.42 FTEs

# enChoice AI Enabler for FileNet Use Case #2: Claim Documents



- ✓ A large insurance company claims division
- ✓ Over 1,200 employees interacting with multiple documents simultaneously
- ✓ Documents received from multiple external channels (scanned, faxed, etc.) which often are NOT AI ready!

# Use Case #2: | Business Problem



**Massive claims repository** that is ever growing



Research requires **several documents and various departments** (medical, legal, etc.) to satisfy an inquiry

# Use Case #2: | Assumptions

## 10 Million Existing Documents

10 Million existing documents in FileNet for summarization and Q&A by IBM Content Assistant

## 40K New Documents Daily

40,000 new documents are added to FileNet every day

## 50 Million Pages NOT AI Ready!

10 Million documents x 5 pages per document = 50+ million pages of PDF  
Images and TIFF files NOT AI Ready!

## 900 Questions Daily

Users will ask approximately 900 questions a day

## Use Case #2:

## Solution



Research that took  
**6+ minutes** can  
now be done in  
**seconds!**



Improved  
**claim phone support**



Claim Representative  
**FTE Savings:**  
**\*11.25 full-time  
equivalent employees**

\*900 queries x 6 minutes = 5,400 minutes / 60 minutes per hour = 90 hours per day savings / 8 work hours per day = 11.25 FTEs

# Litigation/Compliance Concerns?

AI-informed decision-making is coming under **increased scrutiny** in the context of algorithm-driven discrimination:

## Case #1

Williams v. Wells Fargo Bank, Civil Act. No. (N.D. Cal. Feb. 17, 2022)

## Case #2

Mobley v. Workday, Civil Act. No. 23-cv-00770-RFL (N.D. Cal. Feb. 21, 2023)

## Case #3

EEOC Report to Congress on AI-Driven Discriminatory Hiring Risks (June 14, 2024)

# Litigation/Compliance Concerns?



- ✓ KwikNAV AutoDeclare *automatically* declares into IBM Enterprise Records (IER)
- ✓ Manage the full AI Q&A session as an official record governed by ***your*** retention schedule
- ✓ You are ready for eDiscovery, audit, and defensible disposition!

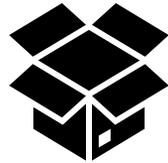
## Summary: IBM Content Assistant + enChoice AI Enabler

- ✓ Fully utilize AI capabilities with your FileNet content
- ✓ See immediate productivity gains
- ✓ Get up and running quickly on your first use-case



# enChoice AI Offering

Offering all the key components and thought leadership to get you up and running with your first use case.



## enChoice Services Starter Pack

*Use Case Identification*  
*Software Installation*  
*Use Case Configuration*  
*Verification of Results*

*Starting at \$10,000*



## enChoice AI Enabler for FileNet Subscription

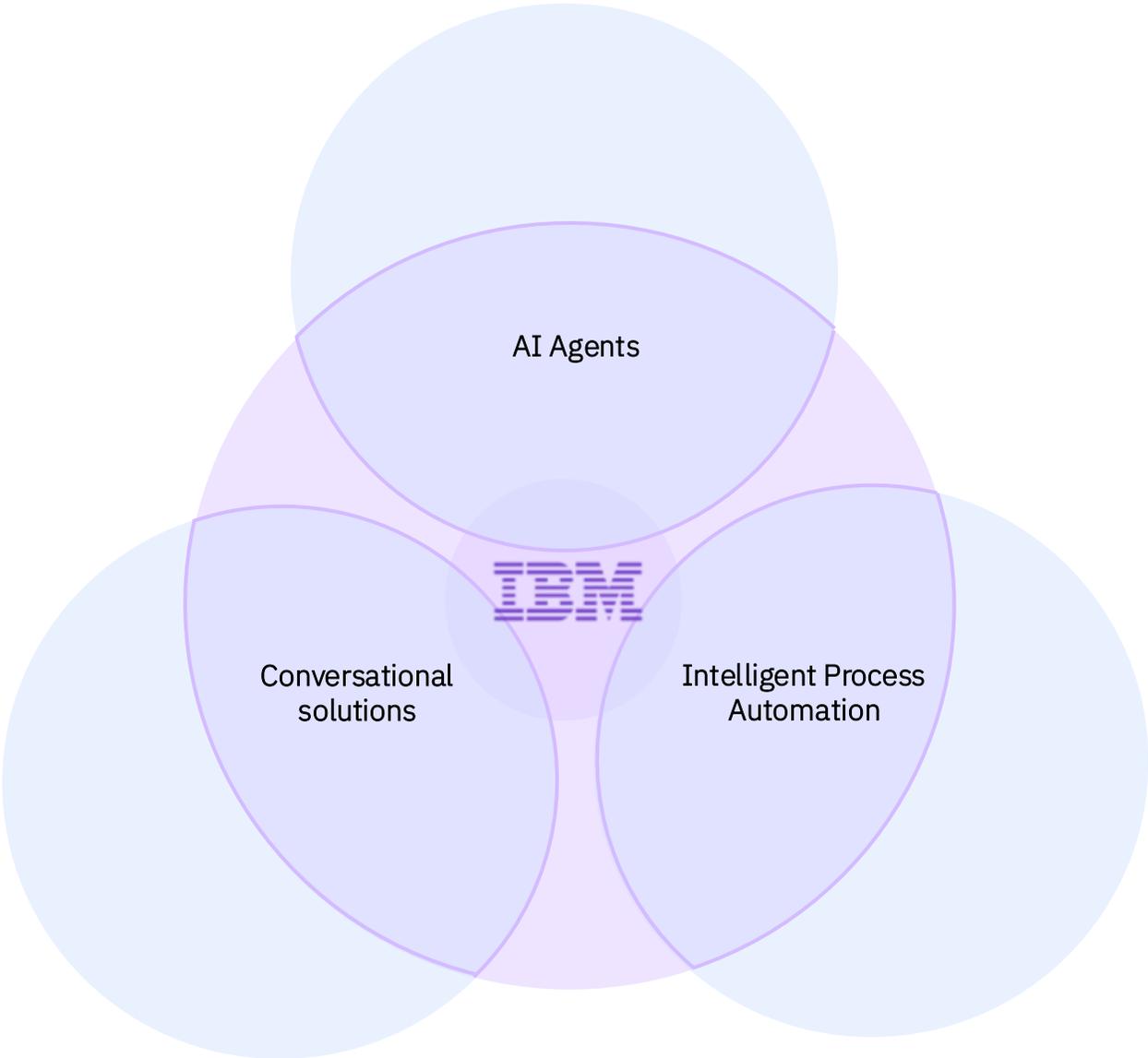
*Content Enablement*  
*Documentation*  
*Support*

*\$3.75 per thousand pages*



[www.enchoice.com/ai-enabler](http://www.enchoice.com/ai-enabler)

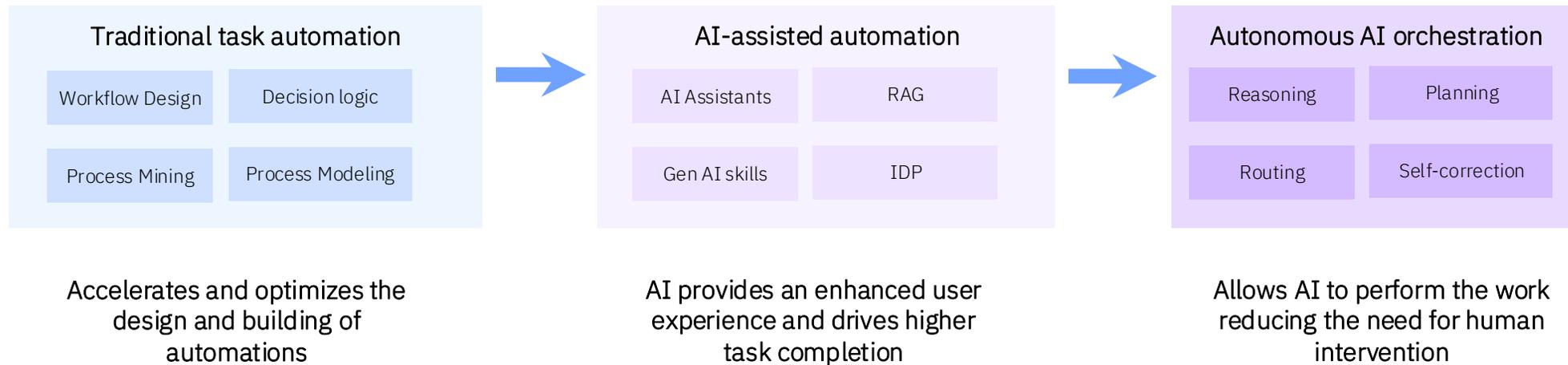
AI Agents tightly integrated with existing AI and automation investments, have ushered [a new opportunity to unlock Enterprise Productivity](#)



# The evolution of Generative AI for intelligent business automation

Fixed Flow  
Act as programmed

Autonomous Flow  
Plan and self-correct



# IBM's vision: providing enterprises with a unified experience to infuse AI and Automation across business processes

## AI productivity

<p><b>Customer experience</b></p> <p>Remove friction across the digital customer experience and drive improved satisfaction and engagement with your brand.</p>	<p><b>Worker productivity</b></p> <p>Boost efficiency and productivity and augment your workforce with AI assistants.</p>	<p><b>Business performance</b></p> <p>Improve overall KPI performance while reducing processing errors.</p>	<p><b>Compliance achievement</b></p> <p>Use data-driven insights to identify automations that yield the highest ROI and set your organization up for compliance success.</p>
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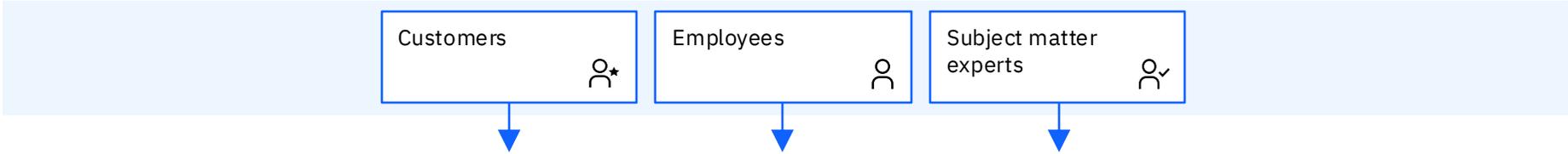
<p>Power employee productivity and customer experience with AI assistants and agents</p>	<p>AI Assistant Builder</p>	<p>Skills catalog to systems</p>	<p>Discover existing automations</p>	<p>Build new AI skills</p>
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<p>Improve business performance with AI-powered automation</p>	<p>Process mining </p>	<p>Decision management </p>	<p>Process and case management </p>	<p>Content services </p>	<p>Robotic process automation </p>	<p>Operational intelligence </p>
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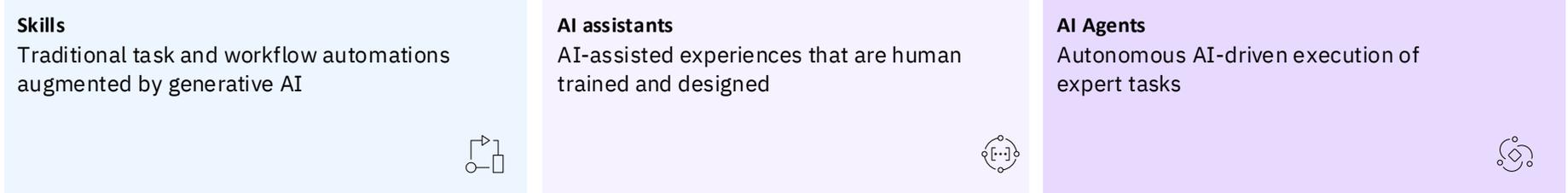
<p>watsonx</p>	<p>IBM foundation models </p>	<p>IBM and third-party LLMs </p>	<p>Prompt Lab </p>	<p>Governance </p>	<p>Data </p>
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# IBM watsonx Orchestrate conceptual architecture

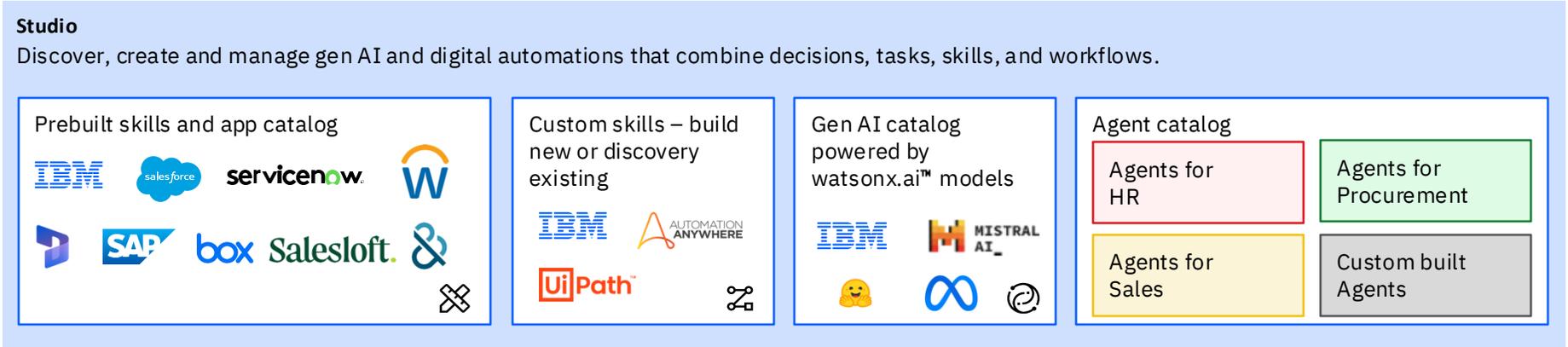
Empower customers and employees through simple, intuitive and guided conversations



Boost productivity with AI and automation

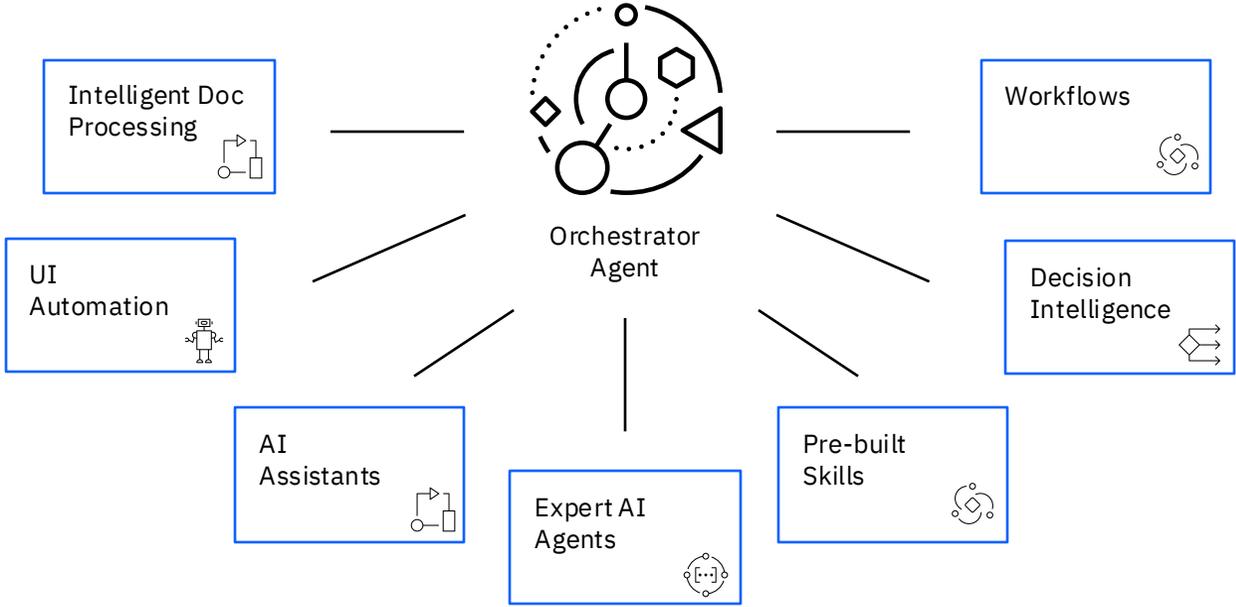


Accelerate time to value with pre-built capabilities or build your own



# Agentic orchestration unifies existing and future automation capabilities

## Omni-channel experiences



### Manage Data

- Data Lakehouse
- Vector Databases
- Content Services

### Govern AI

- IBM and third-party LLMs
- Accelerated Fine-tuning
- Governance

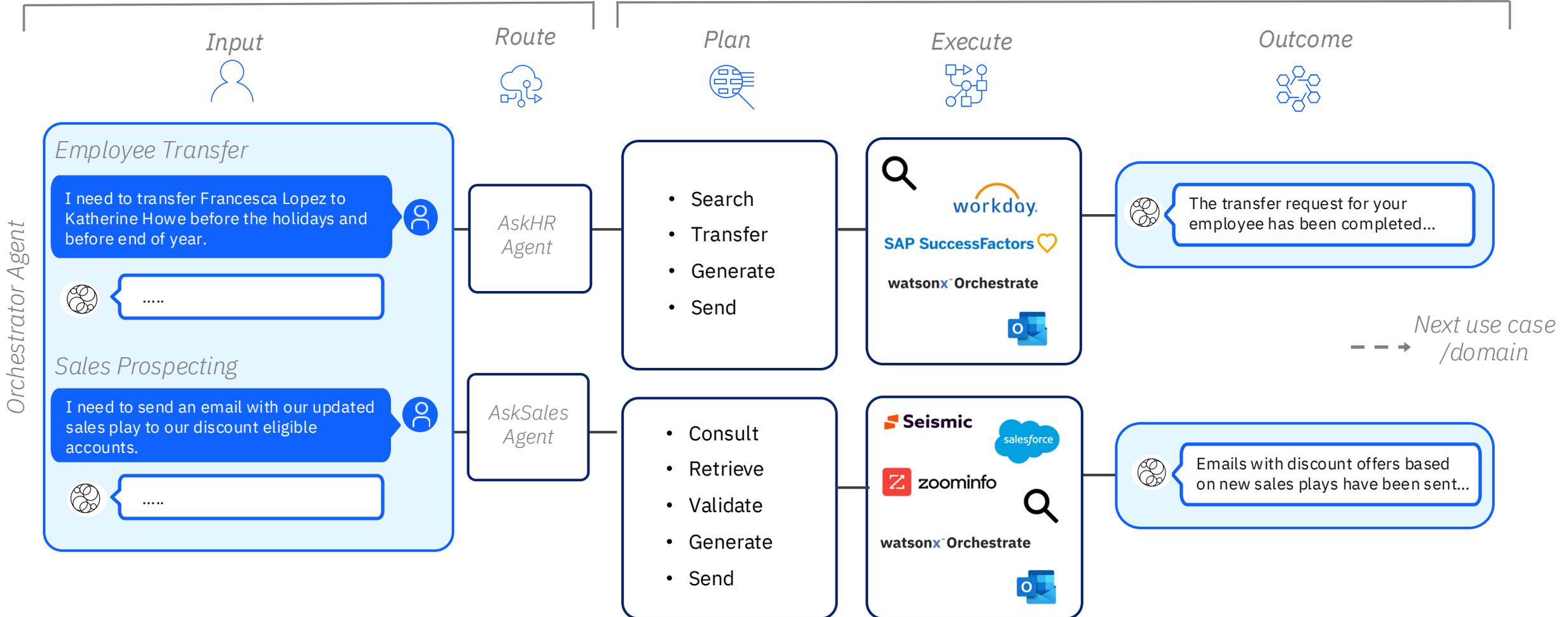
### Process Design

- Process Modeling
- Process Mining
- Workflow Design

# How Orchestrator Agent Reasons and Executes Across Domains

Evaluation and reflection...

Autonomous reasoning and execution...



# Orchestrator Agent Example Use Case: Employee Support

AI Agent Chat

Conversation

I need to transfer Francesca Lopez to Katherine Howe before the holidays and before end of year.

- The AI Agent searches for the employee's and the new manager's details in the HR database and validates the transfer request.

- The AI Agent calls on the right skill to complete the transfer with the information obtained from the HR database.

- The AI Agent generates and sends confirmation emails to the current manager, employee and new manager to provide the official status of the transfer as complete on x day.

The transfer request for your employee has been completed. Francesca Lopez will be transferred to Katherine Howe's team starting 12/16/24.

\*The AI Agent continues by asking if there are further actions that need to be taken such as confirming a salary increase, job posting, employee rewards, etc.

Orchestrator Agent

Supervises and routes

Task sequence

Evaluates, plans and executes

Task sequence

Completes and confirms

Task sequence

Reflects and recommends

Agents, Assistants & Skills

AskHR Agent

AskHR

Task 1: Search

Task 2: Transfer employee

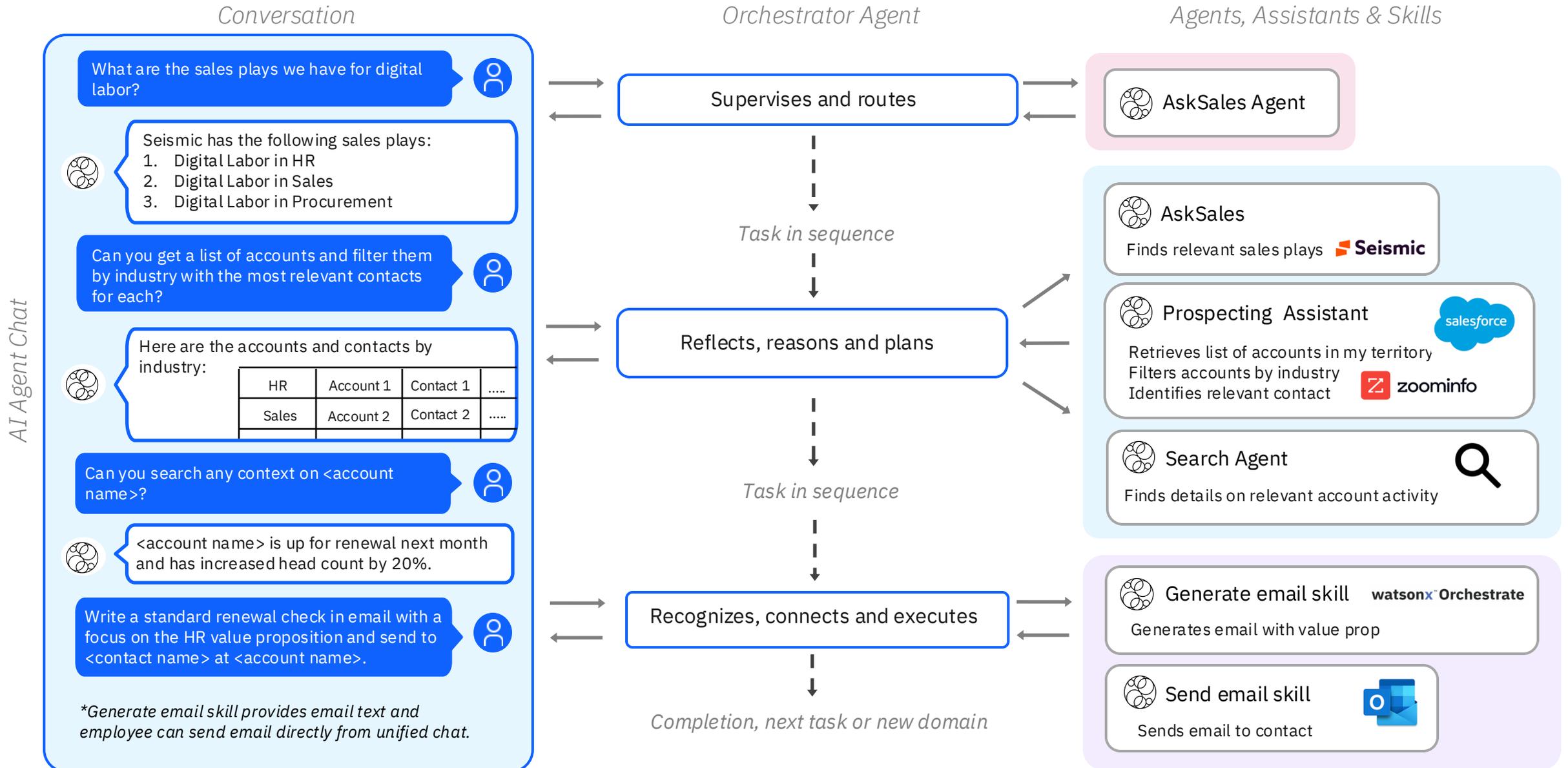
Task 3: Generate email

Task 4: Send email

AskHR Agent



# Orchestrator Agent Example Use Case: Sales Prospecting



What are the sales plays we have for digital labor?



Seismic has the following sales plays:  
 1. Digital Labor in HR  
 2. Digital Labor in Sales  
 3. Digital Labor in Procurement

Can you get a list of accounts and filter them by industry with the most relevant contacts for each?



Here are the accounts and contacts by industry:

HR	Account 1	Contact 1	....
Sales	Account 2	Contact 2	....

Can you search any context on <account name>?



<account name> is up for renewal next month and has increased head count by 20%.

Write a standard renewal check in email with a focus on the HR value proposition and send to <contact name> at <account name>.



\*Generate email skill provides email text and employee can send email directly from unified chat.

## Orchestrator Agent

Supervises and routes

Task in sequence

Reflects, reasons and plans

Task in sequence

Recognizes, connects and executes

Completion, next task or new domain

## Agents, Assistants & Skills

AskSales Agent

AskSales  
 Finds relevant sales plays **Seismic**

Prospecting Assistant **salesforce**  
 Retrieves list of accounts in my territory  
 Filters accounts by industry  
 Identifies relevant contact **zoominfo**

Search Agent   
 Finds details on relevant account activity

Generate email skill **watsonx Orchestrate**  
 Generates email with value prop

Send email skill   
 Sends email to contact

AI Agent Chat

# Build and Deploy AI Assistants and Agents with watsonx Orchestrate

## watsonx Orchestrate

### Assistant builder

Design and build purposeful assistants to complete complex business tasks leveraging LLMs, Automations, and information sources

### Skill Catalog (connectors and automations)

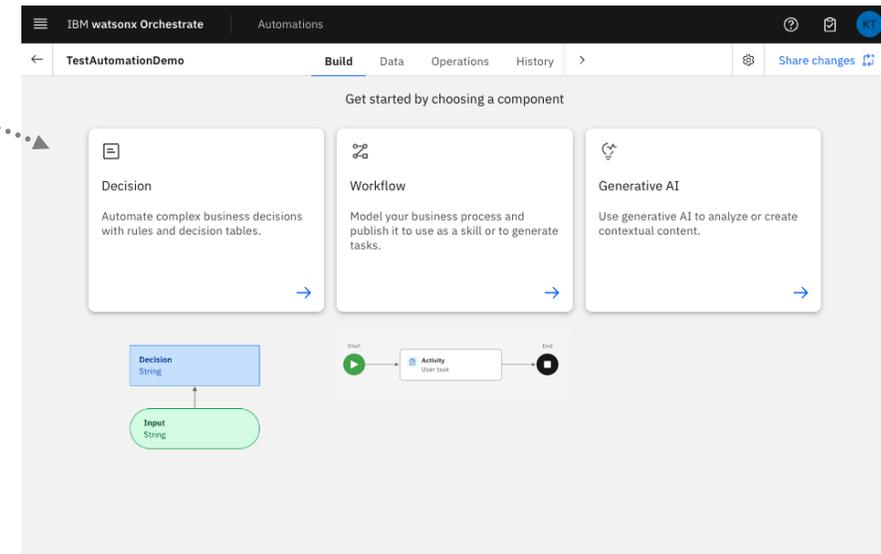
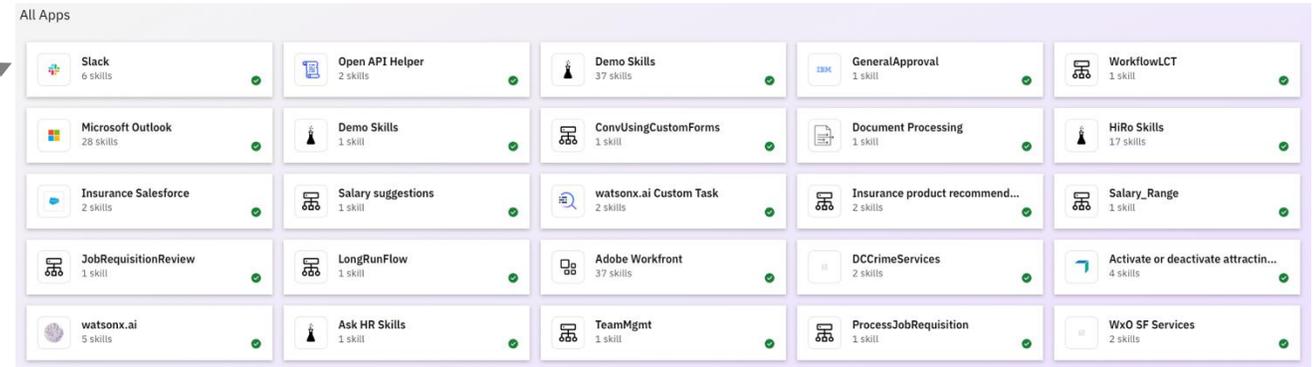
Invoke 1000s of prebuilt skills for HR, Finance, Procurement, Sales, or IT. A single catalog for all your enterprise automations to power assistants

### Skill Studio

Create and manage low-code automations that combine decisions, task flows, skills, APIs, and GenAI in a single authoring experience to power AI assistants

### Enterprise Readiness

Built-in lifecycle and catalog management, analytics, access and federated controls, security and compliance



# Build your own automations and publish them as skills through a low-code interface

## Skill Studio

### Decisions

- Low-code approach to express and refine operational decisions in a structured and visually intuitive way
- Can include rule-based and predictive models

### Workflows

- No-code workflow authoring to define a set of linked tasks designed to achieve a specific business purpose
- Includes existing skills, decisions, predictions, other automations

### Generative AI

- Test, evaluate, and publish generative AI skills
- Select native IBM developed models as well as 3<sup>rd</sup> party LLMs
- Gen AI skills incorporate contextual variables within prompts

### Intelligent Doc Processing (IDP)

- Build low code document processing steps that integrate into workflows
- Digitize, classify and extract data from documents
- Human-in-the-loop
- Handwriting extraction

Skill-based 40 actions Add → Skills studio Add →

The collage illustrates various capabilities of Skill Studio: workflow authoring with decision logic, skill configuration for document processing, and the integration of generative AI prompts to produce contextual content.

- Assistants ×
- AskProcurement ▾
- DigitalSales ▾
- EmployeeServiceAgent ▾
- HealthInsuranceAgent ▾
- ResearchAgent ▾
- SalesAgent ▾
- WXA4Z ▾

☀ Good Evening 5:49 PM

# Hello, welcome to watsonX Orchestrate.

Help me send an email  
Understand AI capabilities with  
the help of AI Assistant.

→

Hello, How are you?  
Understand AI capabilities with  
the help of AI Assistant.

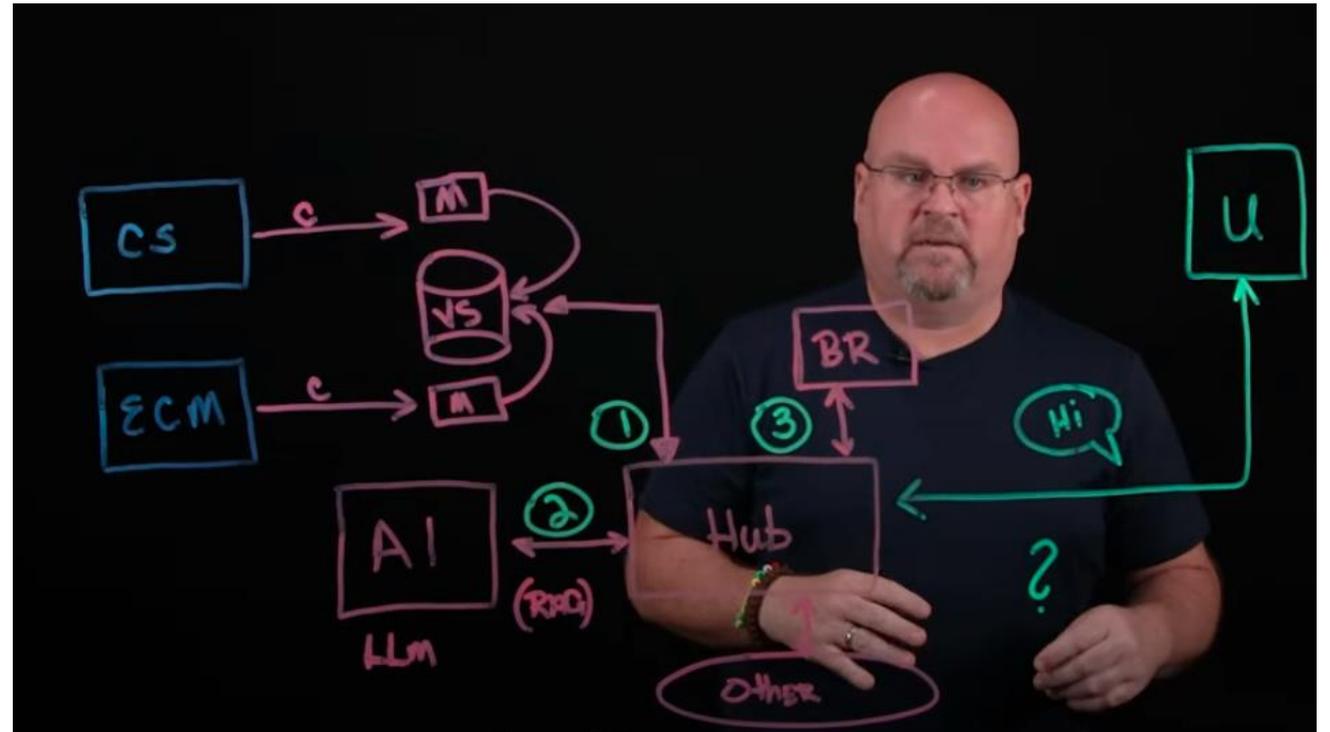
→

Good morning, What day is  
today?  
Understand AI capabilities with  
the help of AI Assistant.

→

Type something... 

# Contract Automation



# Functional Mapping

Contracting operational system of record  
(If you generate contracts externally)

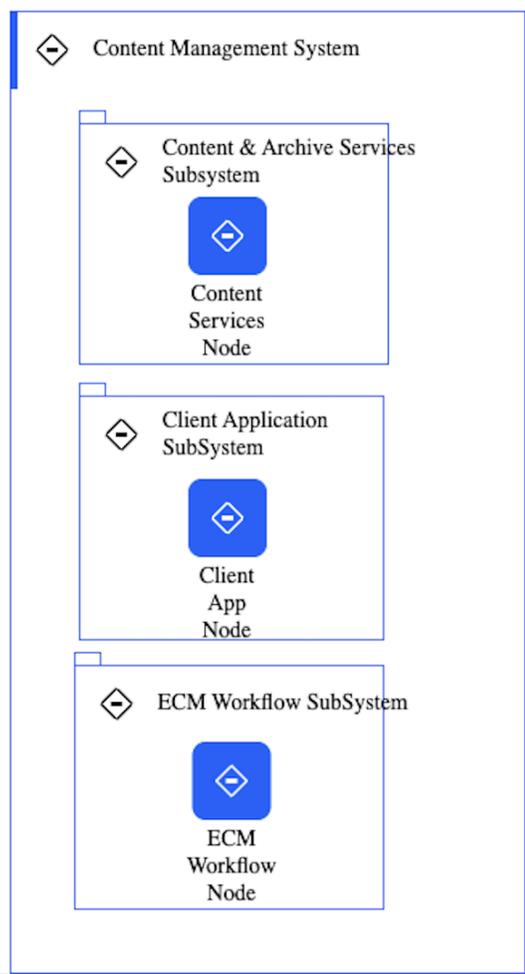
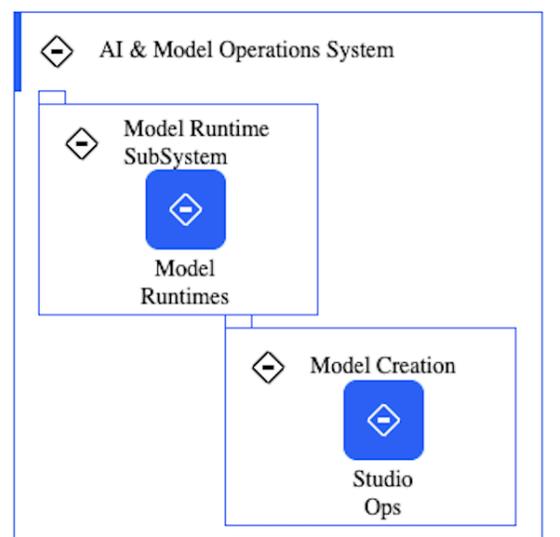
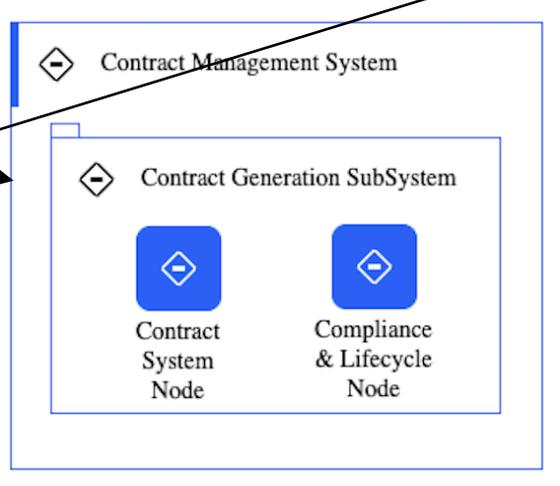
Enterprise Archive and Records System

Artificial Intelligence Operations

How does it all automate together?

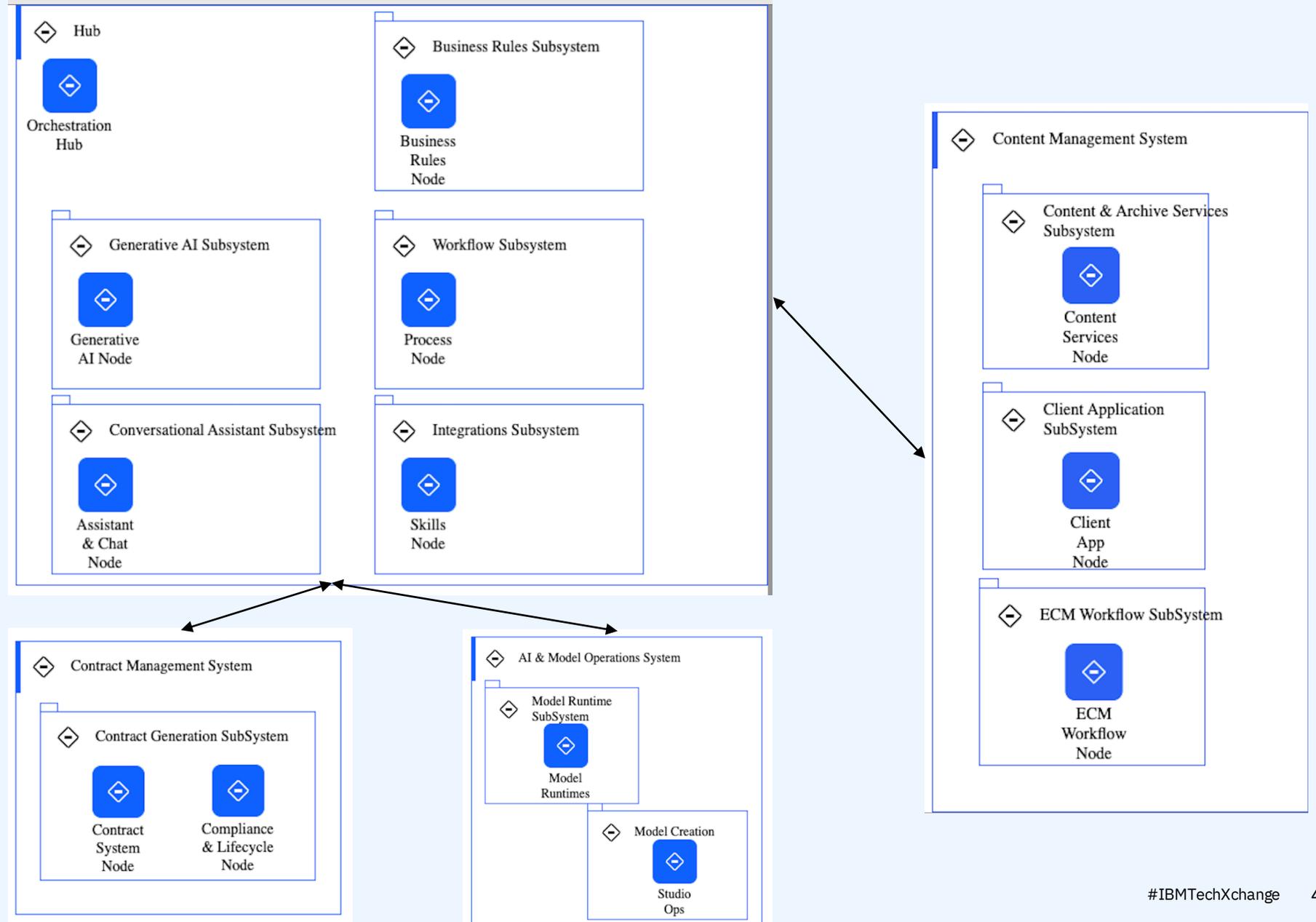
# Components

(Whats Needed)



# Watsonx Orchestrate

- Coordinate all third-party systems from one interface
- Leverage workflow, rules and AI where it makes sense
- Low code – no code deployment



# Group Discussion

What are your use cases for AI Agents?

